Before You Begin LOA

PA30 or PA20
- IT0000 – Actions
  - View employee's last Action; verify eligible for requested leave
- IT0007 – Planned Working Time
  - see if employee is negative or positive employee. **NOTE:** If negative, use Copy function, change the date to the date of the Action, and change the "Time Management Status" field to a "1". When the employee is re-instated, be sure to go back to IT0007 and change the type back to negative.
- If employee is using leave for LOA, PT50 to ensure that employee has enough in leave balance.
- CATS_DA to see if time has been entered, released and approved.
- Check to see if any Agency-specific benefits (handled outside of SAP)

Slide 1

Before processing any type of Leave of Absence (LOA) use the above checklist.

Keep in mind that any Agency-specific benefits are not part of SAP. The Agency will have to work with the employee regarding whether the Agency specific benefits are stopped or if continued how payment will be received.

Leave of Absence - General

1. Create Workflow for LOA and applicable Reason
2. Receive Approval in Inbox and process infotypes:
   a) Actions – Save (everything defaults from WF)
   b) Organizational assignment (enter Contract field if applicable for STD)
   c) Monitoring of tasks:
      i. Reminder to follow-up estimated return date
   d) Objects on loan (delimit or by-pass)
   e) Substitutions – all employees on LOA are to be put on substituted work schedule:
      i. Date: from Action date until 12/31/9999
      ii. Subst. Type field: Appropriate reason
      iii. Work Schedule Rule: D01N08GN for FT; use a 3 in ES grouping for PT

Slide 2

This presentation focuses primarily on Short Term Disability and Military Leave. However, much of the information presented is applicable for any type of Leave of Absence (LOA).

Monitoring of Tasks: if using leave, then do one reminder in Action (either the leave run out or estimated return date) and do the other using PA30.

If not using leave, then you only need to do the 0019 in the Action for estimated return date.

Substitutions: All LOA employees are to be put on substituted work schedules so that any leave that is taken will be applied appropriately. For example, if DOT employee that is 24 hours goes on leave, and not put on substitution, then when the 2001 for leave is applied (for example 5 days leave) SAP thinks the person should be deducted 24 hrs for 5 days. Even if the employee is already on positive pay, he or she must be put on a Substitution. A negative time employee must be changed (IT0007) to positive in addition to Substitution; otherwise the employee will receive his or her regular salary. You should always check infotype 0007 Planned Working time and ensure that the Time Management Status field is "1" for positive working time and change when applicable.

Leave of Absence – General (2)

f) Pop-up for Absences subtypes

Is EE using Leave?

No   Yes

g) If applicable, use 2001 to enter 9400; otherwise close pop-up.

h) Select appropriate type (if ee is using more than one type, you will do a PA30 after the Action to add the other ones):

   a) Dates: From Action date to xxxxx (whatever date it takes to use the leave the ee has requested)

i) Pop-up for time quota compensation (payout)

Has EE chosen payout?

No – Close popup   Yes

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When an employee is on leave, either HR or Time Administrator should be entering the leave if applicable on 2001 and the 9400, not the employee.

Pay out: Employee either has to exhaust leave or receive payout—can't do both at the same time.

Last Day Worked Not for LOA

Do not use for LOA (only for Separation Pay Continuation and Separation)

You only change IT0007 if the employee going on LOA is a negative time employee. If the employee is already positive, you do not perform this step..

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For most LOA Actions, you merely save IT0001 – Organizational Assignment. However if the LOA is for Short-Term Disability (STD) you use the contract field as follows:

Leave blank if either

- Employee has 5 or more years creditable service
- Employee is using leave *
- Employee is on FMLA

Select SHP-STD < 5 Rtmnt if employee has fewer than 5 years creditable service and not using leave

* If employee's leave runs out before returning, you must create new Action (LOA, Reason STD Regular), and select Contract field if applicable.

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Date: The substitution is directly related to the Action, therefore, the *From* date should be the date of the Action, and the *To* date should be 12/31/9999.

Substitutions type: For Short-Term Disability, the applicable subtypes are :

- 05 - LOA Generic: Use when none of the other subtypes apply.

- 06 – STD: Employee has five or more years of service as of 8/12/1989 for the <u>first</u> six months of STD (benefits not subject to state tax). **Important:** Verify there has been no break in service. The 1st 6 mos. Includes the 60 day waiting period.

- 07 – STD: Employee has five or more years of service as of 8/12/1989 for <u>second</u> six months of STD (benefits not subject to state tax).

- 08 – STD: Employee did **not** have five or more years of service as of 8/12/1989 for <u>first </u>six months of STD (benefits subject to state tax). Includes 60 day waiting period.

- 09 – STD: Employee did **not** have five or more years of service as of 8/12/1989 for <u>second</u> six months of STD (benefits subject to state tax).
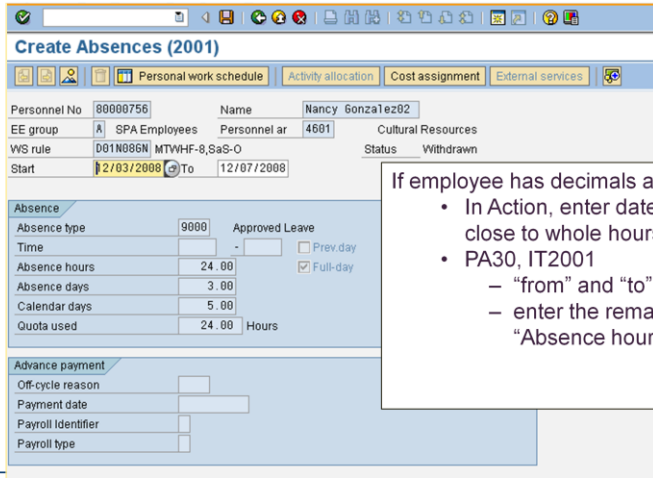
For STD, Substitutions is an infotype that you will have to track and change as applicable (IT0019) in order to ensure that the employee's STD benefits are taxed appropriately.

Daily work schedule: Leave blank.

Work Schedule Rule: If the employee is full-time (40 hours a week), enter D01N08GN in the work schedule field (you must do this even if the employee is already D01N08GN). When you press Enter, the other fields will default with the appropriate information. If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the Work schedule rule field matchcode to select the appropriate part-time schedule.

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The Absences infotype (2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. The dates you enter on the Absences infotype should align with the number of hours the employee wants to be paid out for leave. For instance, if the employee wanted to use 24 hours of leave for the week of 12/3/08 through 12/7/08, you would enter those dates in the **Start** and **To** fields. The "to" date should never be 12/31/9999.

The hours that default are based on the work schedule rule entered on the Substitution infotype combined with the dates you enter on the Absences infotype.

If the employee elects to use more than one leave type, you can only enter one type in the Action. To enter the other leave types, you enter must access PA30 and enter a new IT2001 for each additional leave type.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered. If the Create Absences infotype is not completed, the employee is on leave without pay. If longevity or leave accruals need to be stopped, you should enter 9400 on 2001.
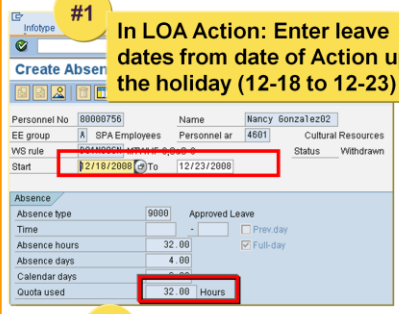
As long as the employee is receiving pay (leave or STD benefit), benefits will continue to be deducted. If not receiving pay, employee must pay for benefits or discontinue them.

To use decimals: Example: Employee has 546.98 hours and wants to use all of them. In LOA Action on IT2001, enter dates so that system calculates as close to whole hours as possible (for example 544). Then process a PA30, IT2001. Enter the effective date with the same from and to date (for example 12/15/08 to 12/15/08). Enter the remaining hours (in the Absence hours column (2.98 in the example).

If the employee is using leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 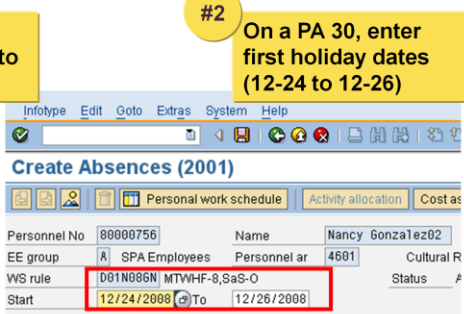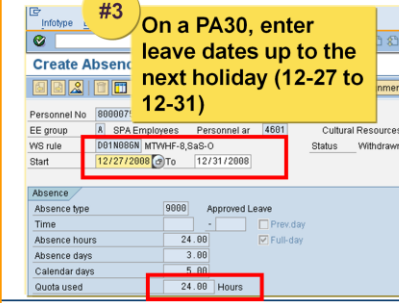160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/24 – 12/26/2008 and 1/1/2009). Your entries would be as follows:

1. During the LOA Action, on the Absences (2001) infotype, you will enter the dates for the leave to be exhausted up to the holiday period in the Start and To fields:

    Start: 12/18/2008   To: 12/23/2008 (32 hours leave)

    By entering the dates above the system calculates that four working days fall within the date range. The substitution previously created issues an 8 hour workday for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

    Start: 12/24/2008   To: 12/26/2008 (24 hours holiday)

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3. Create a PA30 to enter the next leave period **up to** the next holiday, infotype 2001, subtype 9000:

      Start: 12/27/2008   To: 12/31/2008 (24 hours **leave**)

4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:

      Start: 01/01/2009   To: 01/01/2009 (eight hours **holiday**)

5. Create a PA30 to enter the remaining leave, in this case 104 hours, infotype 2001, subtype 9000

      Start: 01/02/2009   To: 01/20/2009 (104 hours **leave**)

By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.

Using Leave Accrued While Out

An employee who is out on paid leave is accruing additional leave. If an employee wants to use the leave that was accrued while out, you would create a PA30 for IT2001 <u>after</u> the accrual to use the number of hours that have been earned while out.

Absences IT2001
• Using 9400

Create Absences (2001)

Use 9400 when the employee is not to accrue while on unpaid leave:
• Longevity
• Leave

Some types of leave allow employees to continue to accrue (see State policy). In those cases, do not enter 9400. For example, do not use 9400 for Military Leave.

When applicable:
• longevity automatically calculates upon Reinstatement
• Leave accruals are not automatic and must be manually entered via PA30, IT2013

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Some types of unpaid leave of absence (like Military) allow the employee to continue to accrue longevity and leave (review State policy). In those cases, do not enter 9400 for the employee. If the employee on LOA is not supposed to accrue leave, then 9400 should be entered for the days the employee is out on unpaid leave.

If the employee is on LOA, the employee cannot enter hours in ESS. An employee on LOA cannot have hours coded to 9500.

Using 9400 and 9500 on the same day for employee not on LOA

If the employee is **not on LOA** but is not at work for part of the day, codes 9400 and 9500 can be entered on the same day. However, keep in mind that the total of the two codes cannot exceed the work schedule hours. If the work schedule hours are exceeded, the hours coded to 9400 will take precedence. For example, if 9400 is entered for 4 hours, and 9500 for 6 hours, then the hours for 9400 will prevail and wipe out all of the hours coded to 9500 (not just the two hours that were over 8, but the entire entry for 9500).

Absences – Using Voluntary Shared Leave

Create Absences (2001)

- In order for a leave donation to be correctly processed, the receiving employee must have a current Absence Pool record (Infotype 696).
- The Donor infotype 0613 must be created; hours are available to recipient next day
- Donated leave goes into the sick bucket of recipient
- Recipient can use the donated leave only after all of the recipient's vacation, sick and bonus is gone

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- Benefits
    - Employee receives LOA Continuation notice (transaction ZBNS008)
    - Employee returns to BEST indicating "continue" or "do not continue"
    - BEST changes benefits as applicable
    - Vendors are notified electronically if benefits are stopped

STD employees who continue benefits and receive any type of pay:
    - both health insurance and NCFlex premiums deducted from STD payments on an after-tax basis.
    - BEACON automatically delimits 401(k), 457 and 403b *

STD employees who continue benefits and not receiving any type of pay:
    - Must mail health insurance premiums to BEST Shared Services Payroll by last day of each month
    - Must send monthly check directly to NCFlex vendor

*LOAs other than STD, BEACON does not automatically delimit the 401(k), 457, and 403. Employee needs to call vendor to stop.

LOA for Workers Comp w Supplement – deductions will be make from supplement, but not from WC payment.

Employees who are out on leave of absence will receive an LOA Continuation form letter. **NOTE:** The letters only print if IT0019 was created for "estimated return date". The form letter is generated by either HR or Benefits using transaction code ZBNS008.

On the form, the employee indicates if benefits should be continued or stopped and returns the form to BEST. If the benefits are to be continued, as long as the employee is receiving pay (leave or STD payments), the deductions for benefits will automatically occur on an after-tax basis. If the employee is not receiving either STD payments or leave, then the employee must send a check as applicable by the benefit deadline date. NC Flex must be sent directly to the vendor according to the vendor's deadline. Insurance premiums are sent to BEST by the last day of each month.

If the employee has Agency specific deductions, those are handled outside of SAP. The Agency should notify the employee about the process in those cases.

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The second screen of IT2010 is used to enter the wage type and the dollar amount of the STD payment. The following wage types are used as applicable.

1332 – Select if employee did <u>not</u> have five or more years of service as of 8/12/1989 for the *first* six months of Short -Term Disability (STD).   Benefits are subject to state income tax.

1333 - Select if employee had five or more years of service as of 8/12/1989 for first six months of STD. Benefits are not subject to state income tax.

1334 - Select if employee's did <u>not</u> have five or more years of service as of 8/12/1989 for *second* six months of STD. Benefits are subject to state income tax.

1335 – Select if employee had five or more years of service as of 8/12/1989 for second six months of STD. Benefits are not subject to state income tax.

Amount – Enter amount to reflect the calculated benefit amount to be paid from forms 714 and 711. For wage types **1332-1335**, BEACON SAP will only allow dollar amounts. Do not enter anything in the number of hours field or number unit field. You can enter multiple 703s on the same day (with effective dates applicable for the month being paid) as long as you do not exceed $3k for the current pay period.

It is a best practice that IT2010 is not entered for a future date. If prior to Legislative Increase, you had already future dated IT2010, you must remember to go back and add in the increase.

When the employee is reinstated, infotype 2003-Delimit appears in the Action. Select the line item and click the Delimit button to delimit the Substitution work schedule. This ensures that the employee is automatically returned to his or her regular work schedule.

When you reinstate an employee who was a negative time employee, you must go back to IT0007 and change the employee back from negative to positive.

Military LOA Action and Reasons

Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	• Reserve Active Duty (leave) – employee is exhausting vacation, bonus or comp time prior to RAD 30 day leave. • Reserve Active Duty (lump sum) - employee is paid for vacation, bonus or comp time prior to RAD 30 day leave. • Reserve Active Duty (30 days) – employee is placed on RAD 30 days with Active Duty orders (calendar days) • Reserve Active Duty – employee is placed on RAD Active Duty on 31st day. • Extended Military – Granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active	Active

Military LOA

Situation: Employee going on LOA Military and using leave prior to 30 days Active duty. According to State Personnel Manual, employee must use leave prior to Reserve Active Duty (30 days). **Three Actions are involved.**

Use the "before you begin an LOA" checklist

- 1st Action: LOA Workflow (ZPAA076)
    - Reason: Reserve Active Duty (Leave)

- 2nd Action: LOA Workflow (ZPAA076) effective 1 day after leave time has been used
    - Reason: Reserve Active Duty (30 days)
- 3rd Action: LOA Workflow (ZPAA076) effective 31st day after Reserve Active Duty (30 days) began (or 1st day that RAD (30) ended).
    - Reason: Reserve Active Duty

Military LOA

- 1st Action: LOA Workflow (ZPAA076)
  - Reason: Reserve Active Duty (Leave)
- After approval received, execute Personnel Action:
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0019 Monitoring of Tasks – Enter reminder date for estimated return date based on orders
  - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
  - IT2003 Substitutions - Enter effective date and 12/31/9999. Select "Military" and Work Schedule rule as applicable
  - Pop-up for Absences subtype: select applicable leave type
  - IT2001 Absences - enter dates that correspond to use requested leave hours
  - Pop-up for lump sum payout – close

- PA30, IT0007: If negative employee, use Copy function to change to Positive
- PA30, IT0019: A second reminder for estimated leave run out in 30 days; new Action needed

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Military LOA

- 2nd Action: LOA Workflow (ZPAA076) effective 1 day after leave time has ended
  - Reason: Reserve Active Duty (30 days)
- After approval received, execute Personnel Action
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0019 Monitoring of Tasks – Enter reminder date for 30 days that a new Action will be needed
  - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
  - IT2003 Substitutions – Save. This should be pre-populated from the 1st Action
  - Pop-up for Absences subtype: select Military Active Duty
  - IT2001 Absences - enter dates that correspond to 30 calendar days
  - Pop-up for lump sum payout – close

- **Differential pay:** If an employee is eligible for differential pay it is paid through Accounts Payable (not by BEST Shared Services Payroll). Therefore, you must coordinate with your Accounts Payable Office to ensure that you send them the appropriate paperwork so the employee is paid his or her differential while out on military leave.

Military LOA

- 3rd Action: LOA Workflow (ZPAA076) effective 31st day after Reserve Active Duty (30 days) began (or 1st day that RAD (30) ended).
    - Reason: Reserve Active Duty
- After approval received, execute Personnel Action
    - IT000 – Save
    - IT0001 – Save
    - IT0019 – Enter reminder date for estimated return date based on orders
    - IT0040 – Skip or Delimit Objects on Loan according to Agency policy
    - IT2003 – Save. This should be pre-populated from the 1st Action
    - Pop-up for Absences subtype: Close*
    - Pop-up for lump sum payout – close

* Do not enter 9400 on 2001. The employee is still eligible for longevity and leave accrual.
    - Longevity automatically occurs when employee is reinstated
    - Leave accrual must be manually entered when employee is reinstated (IT2013)

Examples

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Situation

- Employee on LOA- FMLA for several weeks before you receive paper work that it is STD retro to the effective date of FMLA

Solution

- If the 60 day waiting period <u>has not</u> expired:
    - enter new LOA for 60 day waiting period (can be with or without leave). Monitoring of task reminder for date 60 day ends. Write note that STD retro to FMLA action which includes 60 day waiting period
    - 61st day enter new LOA for either STD (Leave) if employee is using leave, or STD Regular if not using leave
- If the 60 day waiting period <u>has already</u> expired:
    - Enter new LOA for either STD (Leave) if employee is using leave, or STD Regular if not using leave

Examples

Situation

- Employee on LOA- STD (Leave) for several weeks/months and leave runs out. However, in the meantime employee has leave that has been donated or has accrued. How is it used?

Solution

- Verify with Leave Administrator or run PT50 to ensure Leave is in the appropriate bucket (donated leave is available only after time eval has run and is put in the sick bucket)
- Create a new 2001 for the dates that correspond to use the donated leave or enter the leave that the employee has accrued.

Note: If employee runs totally out of leave before returning, create a new LOA, Reason: STD Regular. Use the Contract field on IT0001 if applicable.

Q & A

- EE on LOA using leave, how is it entered in system?
  - IT 2001 in the Action. You may also have to do a PA30 IT2001 if employee is using more than one leave type (can only enter one IT2001 in Action)
- Can employee on LOA enter time through ESS?
  - No. The employee cannot enter time when on LOA; 2001 should be entered by HR MD Mtner or Time Admin, not employee
- How can I look at employee record and tell whether on LOA with pay or without?
  - IT2001 indicates employee is getting paid—use Overview function; if there are no IT2001s on record, employee is not getting paid. Also run Off Cycle Workbench Remuneration Statement.

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Q & A

- If ee is on LOA with leave, can we use either 2001 or CAT2?
  - You should be using 2001
- If a 2001 already exists and someone enters leave for those same dates in CAT2, will the person be double deducted?
  - Yes
- Can you confirm that someone on LOA will not be paid unless someone has entered leave (either ESS or CAT2) or 2001
  - Only if put on Substitution (2003) and set time management on
    007 to "1"—positive pay; otherwise if a negative pay employee, he
    or will get base salary
- If the employee is on LOA, how do you enter a 2001 where the employee gets paid for half the day and is taking leave without pay the other 4 hours?
  - Enter two PA30s for 2001—one for the leave type (approved, sick
    etc.) and one for the 9400

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Q & A

- Is there anything we should know about someone who does not reinstate but separates for some reason?
  - No. You would choose the applicable Separation Action: either
    Separation Pay Continuation or Separation
- We put employee out on LOA and the employee has no leave to use; however, someone gives shared leave, what do we do?
  - Enter a 2001
- If we used 2001 for xx amount of leave, and ee comes back early, what do we do?
  - Delimit the 2001

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Keep in mind that Workbench is not tied to the Action; therefore you must work closely with your Time Administrator to ensure that the FMLA event is created and that absences are associated as applicable.

1) What is the affect of changing an event from *Continuous* to *Intermittent* (or vice versa)? Will the applied absences still be relevant after the change?

Once absences have been tied to an FMLA event, the period information can not be modified. That is, a change from continuous to intermittent or vice versa can not be made. In order to make such a change, the event can not have any absences tied to it. Thus, any attributed absences must be de-selected, the change made, then the absences re-applied.

2) What absences show up on the workbench for an FMLA event?

Any absences that have been approved and transferred (shown on IT2001) and fall completely or partially within the valid dates of the FMLA event will be shown on the absences tab in the work bench. This includes both single and multi-day absences. If an absence falls completely outside the valid date range on the event, it will not be displayed. It also appears that an absence with a valid date through high date (12/31/9999) does not display. An absence with a start date in the valid period and an end date outside the period will be displayed, but will not be available for selection.